

Fidelity Bank

Helping you get where you want to beSM



Quickbooks, Quicken, and Mint Instructions

Fidelity Bank is upgrading to a new online and mobile banking system on February 23rd, 2021. This upgrade will require that you make changes to your QuickBooks or Quicken software, so please refer to the Action Dates and Conversion Instructions below to ensure a smooth transition. Note that the Conversion Instructions each reference the two Action Dates provided below:

1st Action Date: February 19th, 2021

To be safe, a complete data file backup and final transaction download should be completed by this date since full history might not be available for a period of time after the upgrade.

2nd Action Date: March 1st, 2021

Because Quickbooks, Quicken and Mint services may be interrupted for up to 3-5 business days following the upgrade this is the action date for the remaining steps in the Conversion Instructions below. At this time you will complete the deactivation/reactivation of your online banking connection to ensure that you get your current Quicken or QuickBooks accounts set up on the new system.

Please carefully review your downloaded transactions after completing the migration instructions to ensure no transactions were duplicated or missed on the register.

Conversion Instructions:

Quicken – [click here](#)

QuickBooks Desktop – [click here](#)

QuickBooks Online – [click here](#)

Mint – [click here](#)

Post Conversion Trouble Shooting Guide – [click here](#)

If you have any questions or need assistance our Online Banking Upgrade Team will be available to help. You can reach them directly at 978-870-1359 or cmops@fidelitybankonline.com.